MASON

Job Title

APPLY HERE

Associate Financial Planner

- $80K - $110K + Bonus
- Remote + Full-Time
- Medical Insurance
- 401(k)

Who We Are

Mason & Associates isn't your typical financial planning firm—and we like it that way. We're a second-generation, fee-only RIA with a vision for growth, grounded in client-first service and deep expertise.

We're proud of our roots and excited about what's ahead. We've built a national reputation for serving federal employees through specialized knowledge and strong, lasting relationships. Their unique needs allow us to deliver deeply personalized planning while giving our team the opportunity to master a focused niche. That's why we're building clear paths for financial planners to step into meaningful client-facing roles—supported by mentorship, collaboration, and a culture that shares knowledge freely—so growth happens at a pace that matches each person's skills, ambition, and readiness.

We proudly host the Federal Employee Financial Planning Podcast and have been featured on leading stages such as the Kitces Financial Advisor Success Podcast and XYPN LIVE. Our team includes recognized leaders—Top 40 Under 40 advisors, FPA Chapter Past Presidents, and AICPA honorees—who bring both expertise and vision. Recognized on the prestigious Inc. 5000 list, we're a nationally respected, forward-looking firm with deep roots, bold vision, and an open door for those ready to help shape what's next.

Why Federal Employees Are an Exceptional Niche

Federal employees are among the most mission-driven, high-impact professionals whose work keeps our nation running. Our clients serve in some of the most exciting and respected institutions in the country—the military, the Department of Defense, NASA, the National Institutes of Health, the FBI, and the Drug Enforcement Administration. They're the hidden C-Suite: financially successful, humble, and a pleasure to work with.

Our deep knowledge of federal benefits, TSP, and healthcare means we don't waste valuable client time getting up to speed. Instead, we focus right away on adding value, building trust, and creating strategies that make a real impact. Now more than ever, federal employees need guidance to navigate new retirement opportunities and government changes.

About The Role

Are you an experienced Associate Planner ready to take the next step into a lead role?
At Mason & Associates, you'll grow into leading client relationships, take on greater responsibility, and deepen your planning expertise, particularly in the specialized area of federal employee retirement. Experience in this niche is a big plus, but what matters most is your ability to lead with care, follow through consistently, and deliver thoughtful, high-quality advice. The role is full-time, with flexibility for remote or hybrid work.

You'll work closely with partners and senior financial planners who specialize in serving federal employees, contributing directly to client relationships while deepening your knowledge of federal benefits and retirement strategy. In this role, you'll prepare meeting materials, conduct financial planning and analysis, and help translate recommendations into clear, actionable steps for clients.

We're looking for a proactive, process-oriented professional who's organized, able to support multiple financial planners, and has begun stepping into client-facing conversations. You don't need to be fully leading relationships yet, but you've taken the lead on portions of meetings or relationships, supported senior financial planners directly, and are eager to grow. High client service standards and follow-through are essential. If you have a strong foundation in financial planning and are ready to begin leading client relationships within 6-12 months—with the goal to be fully up to speed in 24 months or sooner—we'd love to meet you.

You won't be expected to bring clients, do business development, or manage others. Instead, you'll support and grow relationships with both new and existing firm clients, with career paths available for those who want to grow in leadership, business development, or other areas over time.

Client Management

- Serve in a support role for senior planners—contributing to all aspects of the planning process and gradually transitioning some client relationships into your care over time.
- Within 6-12 months, begin taking the lead on new client relationships with the support of a senior planner, overseeing onboarding, managing the annual service calendar, and facilitating client surge review meetings.
- Serve as a key point of contact for client needs between meetings, helping address questions, coordinate timely responses, and provide planning guidance as life situations and opportunities arise.
- Lead data gathering and initial analysis to support the development of financial plans and the delivery of client services.
- Support prospect meetings by helping explain the firm's process and assessing mutual fit, with opportunities to lead portions of the conversation as your role grows.
- Collaborate with senior planners in a team-based environment where client relationships and expertise are shared across the firm.

Financial Planning

- Support senior planners in preparing for and following up on client meetings, including drafting summaries, updating plans, and tracking action items.
- Review client goals and financial objectives to support the development of comprehensive, personalized financial plans—including tax and investment recommendations aligned with each client's goals and values.
- Support ongoing tax strategy, including income tax projections, Roth conversions, withholding adjustments, and charitable planning. Familiarity with Holistiplan, CCH, and multi-state tax rules is preferred.
- Build subject matter expertise in FERS and CSRS retirement systems and apply that knowledge to help federal employees optimize their retirement benefits and long-term planning strategies.

- Monitor client plans proactively, identify areas for updates, and coordinate the delivery of needed services in collaboration with planners and client service team members.
- Collaborate with a senior planner to prepare investment recommendations that align with the client's financial plan and firm-wide strategy, including considerations of tax efficiency and asset allocation.
- Monitor client portfolios to ensure they remain in the correct model, confirm accurate billing, and address excess cash positions in alignment with firm investment strategies.
- Maintain accurate records and planning documentation within the firm's CRM and financial planning tools to ensure continuity, compliance, and a high-quality client experience.
- Communicate clearly and consistently with clients and their professional advisors (e.g., accountants, attorneys) to support integrated planning.
- Adhere to all compliance and risk procedures, follow firm policies and regulations, and stay current through ongoing education and internal training.

Skills & Experience

We're looking for candidates who bring the following skills and experience to thrive in this role.

- 3+ years of experience in an associate planner or financial planning role.
- CFP® certification is preferred (including candidates who have passed the exam or are actively pursuing it). Series 65 is required unless you hold the CFP® or equivalent.
- Experience in investment management, including rebalancing, allocation adjustments, account maintenance, and providing client recommendations.
- Strong interest or experience in comprehensive tax and retirement planning. EA, CPA, or prior tax preparation experience is a plus, but not required.
- Strong verbal and written communication skills, emotional intelligence, and the ability to build trust with clients and colleagues.
- Highly organized and detail-oriented, with the ability to manage financial data, perform accurate analysis, and keep planning tasks and timelines on track.
- High integrity—you own your mistakes, act with transparency, follow through, and show up for your team—always putting clients' interests first.
- Comfortable stepping into client-facing responsibilities and growing into greater independence over time.
- Experience with our core platforms (Axos, GeoWealth, Wealthbox, RightCapital, Holistiplan) or similar tools—and the ability to learn new systems quickly.
- Committed to ongoing learning and professional development.
- Willingness to work Eastern Time (or near-ET) hours and travel a few times a year for in-person team meetings.

Compensation & Benefits

The associate financial planner is a full-time, W-2 position. Base compensation ranges from $80,000 to $110,000, depending on experience, plus potential bonus, bringing total compensation into the $92,000 to $126,000 range. Applicants with a CFP® certification and experience leading client relationships may be considered for a Financial Planner role with adjusted compensation.

Benefits include 100% firm-paid health insurance for employees (50% for dependents), a 401(k) with 3% automatic safe harbor contribution plus a 50% match on employee contributions up to 5% of compensation, PTO, paid holidays, support for licensing and professional development, and a remote or hybrid work structure.

Questions?

Contact resumes@talentlinksolutions.com with any questions, or **click here to apply directly.**